



# Welcome to the Content Cloud

One platform for financial services



From loan applications to insurance claims, your firm runs on content. As customer expectations for digital experiences continues to change, keeping critical content secure and compliant is more important than ever. In the Content Cloud, you get one secure place to manage the entire content journey across file creation, sharing, co-editing, signature, classification, and retention.

## Put your content to work

### Banking

#### Client onboarding

Enable efficient and intelligent customer onboarding processes to improve satisfaction and retention

#### Loan origination

Accelerate loan intake with transparent processing and archiving, along with secure submission of sensitive information

#### Virtual data room

Create a centralized, secure, and compliant virtual data room for sell side and buy side deal transactions like M&A activities, private equity, and contract negotiations

### Insurance

#### Policy onboarding

Create an interactive and transparent policy onboarding process to improve the client experience and speed up processing time

#### Claims management

Shorten the claim lifecycle and simplify claim management by centralizing client and agent data in one place

#### Policy servicing

Provide a simple digital experience for customers and insurers to easily access, edit, and share data throughout entire process

### Investment services

#### Digital vault

Create a custom digital experience for secure, open communication between customers, advisory committees, and external stakeholders

#### Investor relations

Drive seamless multiparty collaboration, where exchanges of confidential content stay both secure and compliant

#### Pitch book creation

Gather, create, and manage pitches and client facing proposals in one location to easily share with customers and prospects

## Box at-a-glance

- Founded in 2005
- 6,000+ Financial Services customers & 67% of the Fortune 500
- 1,500+ integrations with leading productivity tools such as Microsoft 365, Google Workspace, Salesforce, and Slack

## Industry recognition

- Leader in Gartner Magic Quadrant for Content Services Platforms, 2020
- Gartner Customers' Choice vendor for Content Collaboration Tools, 2020
- Leader in IDC MarketScape for SaaS and Cloud-Enabled Content Apps, 2019
- Leader in Forrester New Wave for Cloud Content Platforms, 2019
- Leader in Aragon Research Enterprise Content Platforms Globe, 2020
- Leader Nucleus Research Enterprise Content Platforms, 2020

## Trusted by global leaders

ATB Financial



GEICO

KKR

NOMURA

Morgan Stanley

## Protect your content

### Box Shield

Prevent data breaches with classification policies and intelligent threat detection

### Box Governance

Manage document retention policies and conduct defensible discovery

### Box Zones

Address data residency obligations across multiple geographies

### Box KeySafe

Maintain full control of your encryption keys

### GDPR Compliance

GDPR-ready platform to facilitate GDPR compliance

## Empower your people

### Box Sign

Securely and seamlessly sign documents electronically, right where your content lives

### Box Relay

Automate content-centric business processes, such as review, approvals, and onboarding

### Box Canvas COMING SOON

Bring teams together and turn ideas into action with rich, interactive visual collaborating and whiteboarding

### Box Drive

Work with all of the files you have stored in Box, right from your desktop

### Box Notes

Collaborate on content with multiple teammates at the same time

### Box Platform

Extend the power of Box with APIs to connect content across your business apps

## Connect your business



## Enterprise Plus

Box Enterprise Plus brings the best of the Content Cloud to Box customers in one plan. We've included our most-valued products and services to help power your entire organization. And you save up to 35%.

### Whats included with Enterprise Plus

#### Box Enterprise

#### Box Governance

#### Box Shield

#### Box Relay

#### Box Sign\*

#### Box Consulting and Support

#### Large File Upload

#### Box Platform

#### Box Zones (available on request)

## Your firm runs on content

### Lending

- Client onboarding
- Loan origination
- Virtual data room

### Wealth management

- Pitch book creation
- Investor relations
- Digital vault

### Claims

- Policy onboarding
- Claims management
- Policy servicing

### Legal

- Records management
- Client-counsel collaboration
- Deal support

### Sales

- Sales productivity
- Contract management
- Sales enablement and training

### HR

- Employee onboarding
- Employee training hub
- Employee records management

## Customer success and services

### Box Consulting

Simplify your tech stack and unlock widespread adoption

### Box Shuttle

Migrate your content using expert resources and top technology

### Box Customer Success

Partner with Content Cloud experts to accomplish company goals

### Box Education

Learn and get certified on Box products and change management

### Box Support

Get the answers you need and solve issues with ease